



**Global and China ADAS Camera Industry  
Chain Report, 2015-2020**

**Jun. 2016**

## **STUDY GOAL AND OBJECTIVES**

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## **REPORT OBJECTIVES**

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## **METHODOLOGY**

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

With the enhancement of worldwide automotive safety standards and automotive electronization as well as people's growing demand for safe driving, the global ADAS market has entered a rapid growth stage, which further promotes the radical development of the car camera market.

### 1. Global Market:

In 2015, the global front camera shipments hit 9.1 million, and that of rear view and surround view cameras totaled 37.4 million. With the gradual escalation of ADAS penetration, the global car camera shipments will grow steadily. By 2020, the global front camera shipments will reach 33 million, and that of rear view and surround view cameras will add up to 97.9 million.

In 2015, the global shipments of rear view systems and surround view systems arrived at 13.8 million and 5.9 million sets respectively. In the next few years, the figures will be in the high growth phase and will soar to 25.1 million units and 18.2 million sets by 2020 respectively.

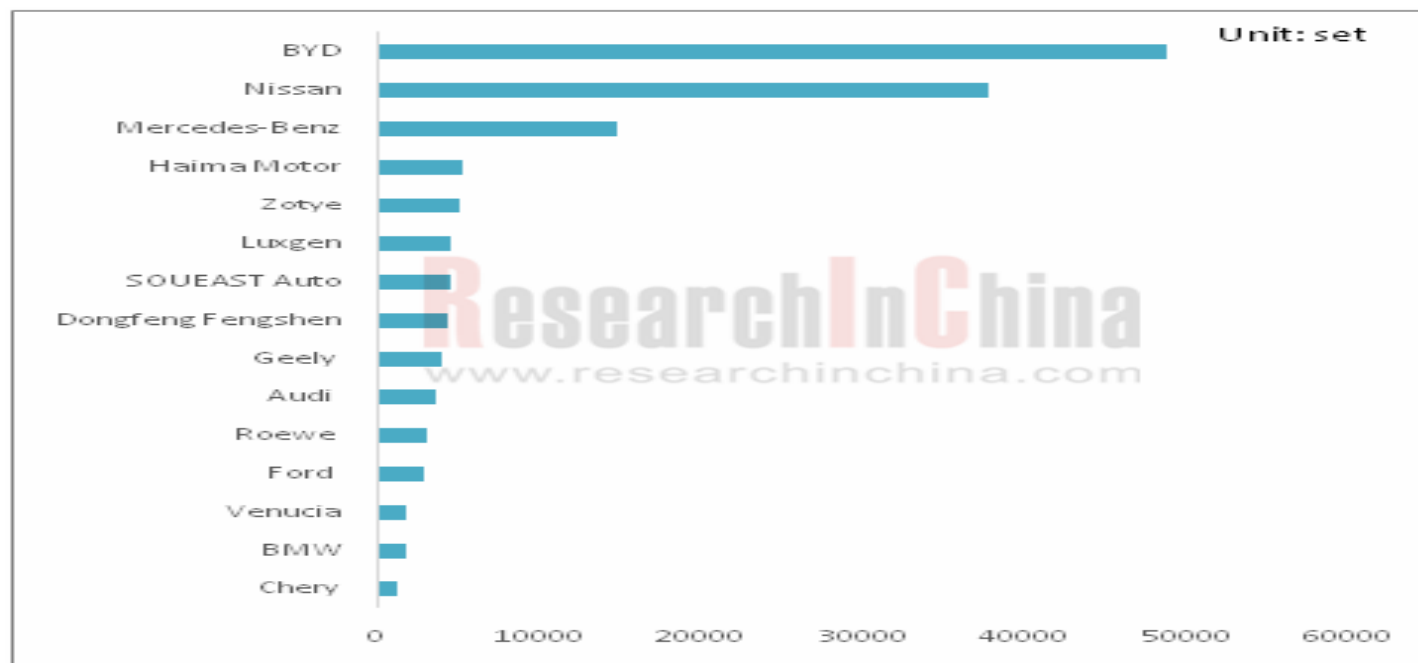
Currently, the global ADAS vision system vendors include Magna, Clarion, TRW (ZF), Continental, Autoliv, Valeo, etc.. In 2015, Magna, Hitachi, TRW (ZF) and Continental seized the market share of 15%, 13%, 11% and 10% relatively. Wherein, the surround view system market is mainly occupied by Clarion and Valeo, which enjoyed a combined 40% market share in 2015; 20% of the rear view system market is dominated by automobile manufacturers, while independent suppliers Magna and Panasonic grasped the highest market share of 30% in 2015 jointly.

### 2. Chinese Market:

At present, China's car camera capacity is about 25.7 million. With the continuous expansion, the annual capacity is expected to exceed 100 million to 109.5 million by 2020. In 2015, Chinese car camera OEM market size equaled to 10 million; by 2020, it is expected to reach 38.65 million.

From January to April of 2016, China preinstalled 152,000 sets of surround view system and 132,000 sets of fatigue monitoring system; the pre-installations in 2016 are expected to be 460,000 and 400,000 sets respectively. By 2020, the pre-installed capacity will jump to 1.35 million and 1.15 million sets separately.

## TOP15 Chinese Automobile Vendors by Surround View System Pre-installation, Jan-Apr 2016



Source: ResearchInChina

The report includes the following aspects:

- Overview (including definition, classification, characteristics, industry chain and application) of ADAS cameras;
- Overview of global and China ADAS camera industry, including status quo and trends;
- Analysis on ADAS camera industry chain, embracing market size and competitive pattern of camera modules, CMOS sensors and system integration;
- Analysis on major ADAS camera vendors, including 6 ADAS camera module vendors, 7 CMOS sensor vendors, 6 systems integrators and a chip and algorithm vendor.

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